



Foreign Agricultural Service

**GAIN Report**

Global Agriculture Information Network

Required Report - public distribution

Date: 12/18/2001

GAIN Report #JA1107

## Japan

## Fishery Products

## Annual

## 2001

Approved by:

**Richard Battaglia**

**U.S. Embassy, Japan**

Prepared by:

Kakuyu Obara

---

**Report Highlights:** During 2001, Japanese fish and seafood consumption continued to decline due to the ongoing recession and deflationary pressures. However, consumer concerns about BSE may boost demand in 2001 and 2002 as consumers seek alternatives to beef. The U.S. remains the largest supplier of seafood to Japan, the world's biggest per-capita seafood consuming country. Salmon consumption is expected to grow in 2001, although U.S. exports will fall due to smaller catches. Imports of U.S. surimi are expected to rise by 15% in 2001, while imports of U.S. cod and pollock roe are expected to jump by 48%.

---

Includes PSD changes: Yes  
Includes Trade Matrix: No  
Unscheduled Report  
Tokyo [JA1], JA

Japan's Seafood Market Overview .....	<a href="#">2</a>
Japanese Fish and Seafood Consumption Continues to Decline Due to Economic Recession and Deflationary Pressures .....	<a href="#">2</a>
Detection of BSE May Slow Decline in Consumption .....	<a href="#">2</a>
U.S. Continues to be the Top Supplier of Fish and Seafood Products to Japan ..	<a href="#">2</a>
1. Salmon and Trout Section .....	<a href="#">3</a>
Salmon and Trout Consumption Expected to Grow in 2001 Due to Lower Prices and an Abundant Domestic Fall Season Catch; Imports from Chile and Norway on the Rise, Imports from the U.S. Down Due to Another Poor Catch .....	<a href="#">3</a>
2. Salmon and Trout Eggs (Ikura) / Roe (Sujiko) Section .....	<a href="#">4</a>
Reduced Imports of Alaskan Eggs/Roes Leads to Supply Shortfalls .....	<a href="#">4</a>
3. Surimi Section .....	<a href="#">5</a>
Strong Demand for Surimi Products Generates Import Demand for U.S. Medium and Low Grade Pollock Surimi .....	<a href="#">5</a>
4. Cod/Pollock Roe Section .....	<a href="#">6</a>
Jump in Imports of U.S. Pollock Roe Expected to Ease Tight Supply Situation .....	<a href="#">6</a>
Supplemental Section .....	<a href="#">7</a>
Asian Countries Gearing Up Supply of Prepared Seafood to Meet Growing Demand in Japan's Convenience Food Sector, with China Emerging as a Major Player in this Market .....	<a href="#">7</a>
Comments on Post Seafood Demand and Supply Projections .....	<a href="#">8</a>
Table A-1 Annual Expenditures per Household .....	<a href="#">9</a>
Table A-2 Annual Quantities Consumed per Household .....	<a href="#">10</a>
Japanese Salmon/Trout PS&D Table .....	<a href="#">11</a>
Japanese Salmon/Trout Eggs/Roe PS&D Table .....	<a href="#">12</a>
Japanese Surimi PS&D Table .....	<a href="#">13</a>
Japanese Cod/Pollock Roe PS&D Table .....	<a href="#">13</a>

## Japan's Seafood Market Overview

### Japanese Fish and Seafood Consumption Continues to Decline Due to Economic Recession and Deflationary Pressures

Data from the first half of 2001 shows that overall fish consumption by Japanese households continues to decline. Expenditures for fresh fish fell by 6%, while salted and dried fish fell by 4%, and shellfish fell by 11%. Quantities purchased by Japanese households fell by 4% for fresh fish, 2% for salted and dried fish, and by about 10% for shellfish (see tables A-1, A-2).

The decline in consumption has been driven by the deepening recession and deflationary economic conditions. Japanese consumers have become more price-sensitive in their buying habits. Consumption of fresh salmon, for example, showed substantial increases during the first half of 2001 due to lower prices arising from intense competition from farm raised salmon imported from Chile and Norway (see section below). Consumption of saury also increased due to lower prices. Conversely, consumption of higher priced fish and seafood products such as salted pollock roe, has dropped considerably.

### Detection of BSE May Slow Decline in Consumption

The detection of BSE (Bovine Spongiform Encephalopathy) cases in Japan this Fall could bolster overall fish consumption in Japan during the fourth quarter of 2001 and into 2002 as consumers seek alternatives to beef. Consumption data for September (2001) shows that household expenditures for all fresh fish increased by 2% over the same period in 2000. Consumption of tuna rose by 4%, which may indicate that consumers perceive tuna, a relatively expensive product, as an alternative to beef.

Post notes that in the European Union (EU), fears over BSE and FMD (foot and mouth disease) in recent years boosted overall fish consumption significantly as EU consumers sought alternatives to beef and pork. Cod and Atlantic salmon particularly benefitted from increased sales in EU markets.

### U.S. Continues to be the Top Supplier of Fish and Seafood Products to Japan

Imports of fish and seafood from the United States represented \$1.4 billion, or 11% of total imports in 2000. Top U.S. imported fish and seafood products include salmon, pollock roe, and pollock surimi. Japan's supply of fish and seafood products is largely met by imports. In 2000, Japan imported over \$12.8 billion of fish and seafood products (HS 0303) from over 70 countries.

The following table shows the top 10 fish and seafood suppliers to Japan. Major export items differ by country and region reflecting differences in fish and seafood resources and specialization. China, for example, is a major supplier of squid, eel, shell fish, shrimp, and prawn. Russia is a major supplier of wild salmon and trout, pollock for surimi, and crab. South Asian countries supply Tiger prawn, eel, and surimi. Taiwan and South Korea specialize in tuna for the Japanese market. Norway is a major supplier of mackerel (*saba*), farm raised Atlantic salmon, and smelt (*shishamo*). (Japanese hotels and restaurants are major end users of air-freighted, fresh-chilled Atlantic salmon from Norway). Chile is the largest supplier of farm raised Coho salmon, which is very popular in the Japanese market.

Top 10 Suppliers Fish and Seafood to Japan						
Unit: Million Dollars						
	1998	1999	% Chg	2000	% Chg.	Share 2000
1. U.S.	1,154	1,425	23.5%	1,397	-2%	11%
2. Russia	881	1,171	32.9%	1,259	8%	10%
3. China	819	995	21.5%	1,154	16%	9%
4. South Korea	737	833	13.0%	866	4%	7%
5. Indonesia	877	760	-13.3%	828	9%	6%
6. Thailand	600	684	14.0%	699	2%	5%
7. Chile	529	627	18.5%	677	8%	5%
8. Taiwan	590	717	21.5%	670	-7%	5%
9. India	592	550	-7.1%	602	9%	5%
10. Norway	460	694	50.9%	602	-13%	5%
Other	3,442	3,981	15.7%	4,048	2%	32%
World Total	10,681	12,437	16.4%	12,802	3%	100%
Source: World Atlas						
Note: All HS 03 Category						

The following table shows major fish and seafood imports from the United States over the past three years. A brief assessment of the market situations and out year projections for select products follows the table.

Top 10 Japanese Imports of US Fishery Products						
Unit: Million Dollars						
	HS Code	1998	1999	% Chg	2000	% Chg.
Fish and Seafood U.S. Total		1,154	1,425	23%	1,397	-2%
Pollock Roe, Frozen	0303.80.020	79	157	98%	305	94%
Pollock Surimi	0304.90.013	181	224	24%	191	-15%
Sockeye Salmon, Frozen	0303.10.010	217	231	6%	155	-33%
Sable Fish, Frozen	0303.79.097	94	103	9%	111	9%
Sea Urchin, Chilled	0307.91.430	90	103	14%	100	-3%
Crabs and Shell, Frozen	0306.14	121	144	19%	97	-32%
Cod, Frozen	0306.00.000	33	54	65%	65	21%
Other Flat Fish	0303.90.000	46	41	-9%	53	29%
Salmon Roe, Dried, Salted	0305.20.030	30	40	32%	37	-8%
Herrings	0303.50.000	34	46	34%	35	-23%
Source: World Atlas						
Note: Salmon roe figure does not include prepared Ikura						

## 1. Salmon and Trout Section

### Salmon and Trout Consumption Expected to Grow in 2001 Due to Lower Prices and an Abundant Domestic Fall Season Catch; Imports from Chile and Norway on the Rise, Imports from the U.S. Down Due to Another Poor Catch

Japan's total salmon and trout consumption in 2001 is forecast to grow by 6% to 470,000 MT. Low prices, abundant domestic Fall season supplies, and increased availability of imported supplies from Chile and Norway are supporting the increased demand. Post expects consumption to remain strong, particularly if consumers seek alternatives to beef as a result of the BSE situation.

Imports from the United States are expected to fall to 35,000 MT in 2001. January - August (2001) trade data shows that imports from the U.S. dropped by 25% from the same period in 2000 due to another poor catch of Bristol Bay salmon. The 2001 catch of Sockeye salmon, Alaska's main export salmon to Japan, reportedly fell by 11%. U.S. imports were also adversely impacted by a weakening yen against the dollar and stiff competition from cheaper Chilean salmon. Total imports of salmon and trout are forecast to increase by 14% to 265,000 MT in 2001.

Imports from Chile during January - August 2001 grew to 104,840 MT, a 40% increase over the same period in 2000. Post forecasts Chile's market share to top 46% in 2001. The jump in imports from Chile reflects an abundance of salmon supplies. Reportedly, surplus production in Chile has pushed the price of Coho salmon down to a level below production costs (320 - 330 yen per kilo for a typical 4-6 pound fish). Chilean exporters are reportedly seeking out Asian buyers to absorb the surplus.

Japanese Imports of Salmon and Trout, Whole/Eviscerated					
Volume: Metric Ton - Customs Clearance Basis					
Period: January - August					
Country of Origin	1999	2000	% Chg	2001	% Chg
United States	33,161	26,239	-21%	19,745	-25%
Chile	59,212	75,105	27%	104,840	40%
Canada	4,568	3,372	-26%	3,899	16%
Norway	44,555	33,339	-25%	43,195	30%
Russia	13,316	15,220	14%	15,517	2%
Others	6,659	4,321	-35%	5,698	32%
<b>TOTAL IMPORTS</b>	<b>161,470</b>	<b>157,596</b>	<b>-2%</b>	<b>192,893</b>	<b>22%</b>
Japanese Imports of Salmon and Trout, Whole/Eviscerated					
Shares: Percent					
Country of Origin	1999	2000		2001	
United States	21%	17%		10%	
Chile	37%	48%		54%	
Canada	3%	2%		2%	

Norway	28%	21%		22%	
Russia	8%	10%		8%	
Others	4%	3%		3%	
TOTAL IMPORTS	100%	100%		100%	

Source: World Atlas

## 2. Salmon and Trout Eggs (Ikura) / Roe (Sujiko) Section

### Reduced Imports of Alaskan Eggs/Roes Leads to Supply Shortfalls

Japan's consumption of salmon and trout eggs/roe in 2001 is forecast down slightly at around 14,000 MT due to smaller supplies arising from a fall in imports, particularly from the U.S. Next year's Alaskan salmon catches will likely determine whether the tight supply situation carries over into 2002. Increased production of domestic eggs/roes from the 2001 fall season catch has done little to ease the tight supply situation as wholesale producer prices reportedly remain high.

Imports of eggs/roes from the U.S. in 2001 are forecast to fall to 6,200 MT, down from 7,821 MT in 2000. Despite the decline, U.S. eggs/roes still represent about 70% of all imports, meeting almost half of Japan's total eggs/roes consumption. Poor Alaskan salmon catches coupled with a strong dollar have caused the reduction in U.S. imports, which have impacted overall supplies in the Japanese market. Increased imports from Denmark and Finland in 2001 will likely do little to alleviate the shortfall.

Demand for eggs reportedly remains strong, particularly in the Japanese food service industry. Trade sources report that U.S. suppliers have increased production of prepared eggs to meet this growing demand, and have cut production of roes.

Japanese Imports of Salmon Eggs/Roe					
Volume: Metric Ton - Customs Clearance Basis					
Period: January - August 1999 - 2001					
Country of Origin	1999	2000	%Chg	2001	%Chg
United States	3,103	3,701	19.3%	2,636	-28.8%
Canada	220	211	-4.2%	80	-61.8%
Russia	2	20	NA	23	17.7%
Denmark	415	418	0.8%	492	17.6%
Finland	266	280	5.3%	313	11.8%
Others	165	125	-24.4%	169	35.6%
TOTAL IMPORTS	4,171	4,754	14.0%	3,714	-21.9%
Commodity: HS 0305.20.030 and 1604.30.010 Salmon Roes					
Shares: Percent					
Country of Origin	1999	2000		2001	

United States	74%	78%		71%	
Canada	5%	4%		2%	
Russia	0%	0%		1%	
Denmark	10%	9%		13%	
Finland	6%	6%		8%	
Others	4%	3%		5%	
TOTAL IMPORTS	100%	100%		100%	
Source: World Trade Atlas					

### 3. Surimi Section

#### Strong Demand for Surimi Products Generates Import Demand for U.S. Medium and Low Grade Pollock Surimi

Japan's total surimi utilization in 2001 for fish cake and paste products is forecast unchanged at about 420,000 MT. Weak economic conditions and shrinking consumer expenditures for food continue to favor medium and low-priced fish cake and paste products, dampening sales prospects for high priced products. Consequently, Japanese manufacturers have reportedly become more sensitive to raw material prices. Product differentiation and appropriate portioning of ingredients will likely become important factors in the fish and seafood processing industry. Current market demand is targeted at low-priced surimi used to make less expensive products. Post expects this situation to continue into 2002.

[Note: Japanese total surimi distribution in 2000 was actually up 4% to 419,000 MT, revising post's earlier estimate, which projected a slight decline from 1999. Falling surimi prices stimulated increased buying by Japanese fish cake and fish paste producers during the second half of 2000.]

Demand for U.S. pollock surimi remains strong and 2001 imports are forecast to rise by 15% to 135,000 MT. Strong demand for lower grade pollock surimi has stimulated buying by Japanese traders. High-grade, high-priced (U.S.) pollack surimi is currently difficult to market in Japan due to the strength of U.S. dollar and deflationary trends in the food market. According to trade sources, supplies of U.S. Pacific Whiting surimi (PW surimi) to Japan this year will drop substantially due to a big cut in the PW fishery quota (40,000 MT in 2000 from 190,000 MT in 1999) in Alaska. Japan's total surimi imports are forecast to jump by 13% to 305,000 MT in 2001. The U.S. and Thailand are expected to remain the top suppliers with market shares of about 44% and 30% respectively.

Other major suppliers of surimi to Japan include Thailand and India. Thailand is a major supplier of surimi from *Itoyori* and other fish species, which is mostly utilized for conventional fish paste products in Japan. Indian suppliers target Japan's conventional surimi market, and almost doubled the quantities shipped during January - August of 2001. According to the trade press, India has eight surimi plants in operation and one under construction, utilizing *Itoyori* and *Guchi* species to produce surimi. A substantial increase in India's surimi output for export to Japan is expected over the next several years.

Japanese Imports of Surimi Imports					
Volume: Metric Ton - Customs Clearance Basis					
Period: January - August					
Country of Origin	1999	2000	% Chg.	2001	% Chg.
US	58,015	58,842	1%	80,800	37%
Russia	8,864	6,257	-29%	4,586	-27%
Chile	4,405	3,918	-11%	5,564	42%
Argentina	13,953	15,335	10%	10,175	-34%
Thailand	48,622	51,652	6%	54,772	6%
China	8,457	8,179	-3%	8,054	-2%
R. Korea	3,025	1,703	-44%	1,646	-3%
India	5,449	5,969	10%	11,080	86%
Others	11,371	14,067	24%	21,825	55%
TOTAL IMPORTS	156,711	159,952	2%	187,422	17%
HS Codes Covered: 0304.90-020, 013, 014, 093, 095 and 099					
Shares: Percent					
Country of Origin	1999	2000		2001	
US	37%	37%		43%	
Russia	6%	4%		2%	
Chile	3%	2%		3%	
Argentina	9%	10%		5%	
Thailand	31%	32%		29%	
China	5%	5%		4%	
R. Korea	2%	1%		1%	
India	3%	4%		6%	
Others	7%	9%		12%	
TOTAL IMPORTS	100%	100%		100%	
Source: World Trade Atlas					

#### 4. Cod/Pollock Roe Section

##### Jump in Imports of U.S. Pollock Roe Expected to Ease Tight Supply Situation

In 2000, tight supplies and higher prices of pollock roe led to a considerable decline in consumption of "tarako" (brined or plain pollack roe) and "karashi mentaiko" (seasoned and spiced pollock roe). In 2001, the supply shortfall is expected to ease due to a boost in imports to previous levels, which should reduce prices and stimulate sales.

Japan's cod/pollock roe use in 2001 is forecast to increase by about 12% to 58,000 MT from 2000, with imports accounting for more than 80% of total consumption. The U.S. and Russia are the two primary suppliers of cod/pollock roe to Japan accounting for about 75% of total imports. Availability of imported cod/pollock roe will continue to be an important factor in the supply and demand picture next year.

Imports of cod and pollock roe from the U.S. are projected to jump by 48% to 22,500 MT due increased supplies arising from a larger fishery quota in Alaska. This will likely help to eliminate the short supply situation in Japan. Total imports of cod and pollock roe are forecast to reach 48,000 MT in 2001, up 14% from 41,942 MT in 2000. Imports from Russia are expected to only rise marginally due to poor catches and declining stocks. In 2000, Russian roe exports to Japan dropped by 50%.

Japanese Imports of Cod/Pollock Roe					
Volume: Metric Ton - Customs Clearance Basis					
Period: January - August, 1999 - 2001					
Country of Origin	1999	2000	% Chg	2001	% Chg
United States	13,749	13,971	1.6%	20,842	49.2%
China	4,658	3,884	-16.6%	3,129	-19.4%
Russia	23,097	11,262	-51.2%	12,613	12.0%
Rep. of Korea	4,452	3,933	-11.7%	2,588	-34.2%
Others	1,539	2,171	41.1%	1,998	-8.0%
Total	47,495	35,221	-25.8%	41,170	16.9%
Commodity: HS 0303.80.020,0305.20.020 and 1604.20.014 Cod/Pollock Roe/Eggs					
Shares: Percent					
Country of Origin	1999	2000		2001	
United States	29%	40%		51%	
China	10%	11%		8%	
Russia	49%	32%		31%	
Rep. of Korea	9%	11%		6%	
Others	3%	6%		5%	
TOTAL IMPORTS	100%	100%		100%	
Source: World Trade Atlas					

## Supplemental Section

### Asian Countries Gearing Up Supply of Prepared Seafood to Meet Growing Demand in Japan's Convenience Food Sector, with China Emerging as a Major Player in this Market

The proliferation of Japanese food service chains coupled with the growing market for ready-to-eat foods is providing alternative markets for fish and seafood exporters. According to the Japan Food Service Association, Japanese food service chains, such as conveyor belt and take-out sushi restaurants, fast-food "bowl" type

restaurants, and family-style restaurants, are reporting strong sales in 2001. Some chains frequently conduct seasonal and special menu offerings that feature fish and shell fish products that are abundantly available at low prices. Such products include: Bonito in late Spring, eel (broiled) during the Summer, saury and oysters during the Fall, and crabs in the Winter.

Although the majority of Japan's fish and seafood trade is generic-based, prepared fish and seafood products are expected to gain additional importance in the import market as demand for ready-to-eat foods grows. China is emerging as a major supplier of prepared foods, including fish and seafood products, to Japan. Frozen and processed food manufacturers from Japan have reportedly committed substantial capital investments in China to take advantage of cheaper labor costs.

### **Comments on Post Seafood Demand and Supply Projections**

Varied and complex factors affect the seafood trade such as yearly catches, relative prices, climate, condition of fish resources, fishery quotas, exchange rates, diseases, and environmental phenomena such as "el Nino". These factors complicate post's projections for out year catches, and hence forecast supply and demand figures. Note that post PS&D projections for 2002 represent the average of the three previous years (including 2001 projections).

**Table A-1 Annual Expenditures per Household**

Category [Fish, Shell Fish, Salted and Dried Fish]							
Unit: Yens							
	1998	1999	% Chg.	2000	% Chg.	2001	% Chg.
	Jan. - Dec.	Jan. - Dec.		Jan. - Dec.		Jan. - June	
Fresh Fish Total	66,257	63,444	-4%	61,000	-4%	27,506	-6%
Tuna	8,965	8,659	-3%	8,453	-2%	3,985	-4%
Horse Mackerel	2,568	2,471	-4%	2,263	-8%	1,065	-11%
Sardines	1,229	1,306	6%	1,133	-13%	543	-20%
Bonito	2,338	2,425	4%	2,417	-0%	1,274	-7%
Flounder	2,376	2,201	-7%	2,068	-6%	1,110	-7%
Salmon	4,343	4,372	1%	4,466	2%	2,110	-1%
Mackerel	1,565	1,517	-3%	1,487	-2%	662	-10%
Saury	1,733	1,497	-14%	1,584	6%	288	11%
Sea bream	2,242	2,052	-8%	1,818	-11%	759	-21%
Yellowtail	4,133	3,683	-11%	3,682	-0%	1,665	-2%
Cuttle Fish	4,193	3,995	-5%	3,697	-7%	1,613	-12%
Octopus	2,051	2,027	-1%	1,965	-3%	839	-11%
Shrimps and Lobsters	5,779	5,438	-6%	5,089	-6%	2,170	-4%
Crabs	3,385	3,024	-11%	2,983	-1%	876	-7%
Other Fresh Fish	12,072	11,715	-3%	11,166	-5%	NA	NA
Sashimi mixed set	7,284	7,063	-3%	6,729	-5%	3,188	-3%
Salted and Dried Fish Total	11,990	11,541	-4%	11,079	-4%	8,651	-4%
Salted Salmon	3,017	3,153	5%	2,676	-15%	1,046	-8%
Salted Pollock Roe	4,130	3,780	-8%	3,578	-5%	1,534	-7%
Dried Young Sardines	1,957	1,810	-8%	1,713	-5%	875	1%
Dried horse Mackerel	1,868	1,767	-5%	1,667	-6%	810	-10%
Dried Sardine	689	627	-9%	595	-5%	303	-11%
Dried Small Sardines	832	728	-12%	666	-9%	284	-11%
Other Salted Dried Fish	9,811	9,245	-6%	8,905	-4%	NA	NA
Shellfish Total	6,683	6,675	-0%	6,367	-5%	3,007	-11%
Short-necked clams	1,581	1,644	4%	1,653	1%	838	-18%
Fresh water clams	832	808	-3%	750	-7%	353	-9%
Oysters	1,455	1,614	11%	1,560	-3%	676	-7%
Scallops	1,743	1,592	-9%	1,552	-3%	719	-4%
Other Shellfish	1,072	1,018	-5%	852	-16%	NA	NA

Source: Management and Coordination Agency, "Family Income and Expenditure Survey"

Table A-2 Annual Quantities Consumed per Household

Category [Fish, Shell Fish, Salted and Dried Fish]							
							Unit: Grams
	1998	1999	% Chg.	2000	% Chg.	2001	% Chg.
	Jan. - Dec.	Jan. - Dec.		Jan. - Dec.		Jan. - June	
Fresh Fish Total	39,801	38,713	-3%	38,440	-1%	17,581	-4%
Tuna	3,538	3,402	-4%	3,400	-0%	1,709	1%
Horse Mackerel	2,420	2,355	-3%	2,222	-6%	1,027	-14%
Sardines	1,462	1,656	13%	1,417	-14%	641	-24%
Bonito	1,294	1,336	3%	1,520	14%	745	-9%
Flounder	1,728	1,615	-7%	1,566	-3%	857	-5%
Salmon	3,005	2,974	-1%	3,140	6%	1,546	8%
Mackerel	1,811	1,726	-5%	1,645	-5%	755	-6%
Saury	2,122	1,632	-23%	1,752	7%	346	21%
Sea bream	1,018	1,010	-1%	882	-13%	372	-22%
Yellowtail	1,953	1,802	-8%	1,961	9%	856	1%
Cuttle Fish	3,993	4,013	1%	3,994	-0%	1,737	-3%
Octopus	1,194	1,292	8%	1,398	8%	602	-12%
Shrimps and Lobsters	2,478	2,474	-0%	2,383	-4%	1,034	-4%
Crabs	1,407	1,258	-11%	1,229	-2%	403	-6%
Other Fresh Fish	8,153	7,932	-3%	7,688	-3%	NA	NA
Sashimi mixed set	2,225	2,238	1%	2,242	0%	1,060	-3%
Salted and Dried Fish Total	11,990	11,541	-4%	11,079	-4%	5,304	-2%
Salted Salmon	2,057	2,107	2%	1,868	-11%	791	2%
Salted Pollock Roe	1,166	1,047	-10%	862	-18%	363	-15%
Dried Young Sardines	583	591	1%	628	6%	324	4%
Dried horse Mackerel	1,618	1,581	-2%	1,560	-1%	773	-7%
Dried Sardine	520	489	-6%	490	0%	268	-7%
Dried Small Sardines	418	372	-11%	347	-7%	153	-8%
Other Salted Dried Fish	5,627	5,354	-5%	5,324	-1%	NA	NA
Shellfish Total	5,306	5,396	2%	5,195	-4%	2,587	-10%
Short-necked clams	1,926	2,041	6%	2,063	1%	1,052	-17%
Fresh water clams	844	817	-3%	762	-7%	361	-8%
Oysters	811	910	12%	929	2%	429	-4%
Scallops	998	905	-9%	840	-7%	423	3%
Other Shellfish	727	722	-1%	600	-17%	NA	NA

Source: Management and Coordination Agency, "Family Income and Expenditure Survey"

**Japanese Salmon/Trout PS&D Table**

PSD Table						
Country	Japan					
Commodity	Salmon, Whole/Eviscerated					(MT)
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		01/2000		01/2001		01/2002
Beginning Stocks	117000	117000	122000	104000	112000	113000
Total Production	210000	205000	225000	220000	0	214000
Intra-EC Imports	0	0	0	0	0	0
Other Imports	250000	232000	235000	265000	0	245000
TOTAL Imports	250000	232000	235000	265000	0	245000
TOTAL SUPPLY	577000	554000	582000	589000	112000	572000
Intra-EC Exports	0	0	0	0	0	0
Other Exports	5000	5000	5000	6000	0	5000
TOTAL Exports	5000	5000	5000	6000	0	5000
Domestic Consumption	450000	445000	465000	470000	0	451000
Other Use/Loss	0	0	0	0	0	0
TOTAL Utilization	450000	445000	465000	470000	0	451000
Ending Stocks	122000	104000	112000	113000	0	116000
TOTAL DISTRIBUTION	577000	554000	582000	589000	0	572000

**Japanese Salmon/Trout Eggs/Roe PS&D Table**

FISHERY PS&D DATA BASE: Fish Roes Historical Series							
Commodity: Salmon/Trout Roes (1,000 Metric Tons)							
	1999		2000		2001		2002
		OLD	NEW	OLD	NEW	OLD	NEW
Beginning Stocks	6	7	7	8	7	8	6
Total Production	5	5	5	5	5	0	5
Intra EC Imports	NA	NA	NA	NA	NA	NA	NA
Other Imports	9	10	10	9	8	0	9
TOTAL Imports	9	10	10	9	8	0	9
TOTAL SUPPLY	20	22	22	22	20	8	20
Intra EC Exports							
Other Exports	0	0	0	0	0	0	0
TOTAL Exports	0	0	0	0	0	0	0
Dom. Consumption	13	14	15	14	14	0	14
Other Use/Loss	0	0	0	0	0	0	0
TOTAL Utilization	13	14	15	14	14	0	14
Ending Stock	7	8	7	8	6	8	6
TOTAL DISTRIBUTION	20	22	22	22	20	8	20

Note: Original PS&D Lotus File (As no equivalent PS&D File Created in Gain)

## Japanese Surimi PS&amp;D Table

PSD Table						
Country	Japan					
Commodity	Surimi					(MT)
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		01/2000		01/2001		01/2002
Beginning Stocks	109000	109000	103000	87000	102000	91000
Total Production	135000	127000	140000	120000	0	131000
Intra-EC Imports	0	0	0	0	0	0
Other Imports	255000	271000	260000	305000	0	281000
TOTAL Imports	255000	271000	260000	305000	0	281000
TOTAL SUPPLY	499000	507000	503000	512000	102000	503000
Intra-EC Exports	0	0	0	0	0	0
Other Exports	1000	1000	1000	1000	0	1000
TOTAL Exports	1000	1000	1000	1000	0	1000
Domestic Consumption	395000	419000	400000	420000	0	414000
Other Use/Loss	0	0	0	0	0	0
TOTAL Utilization	395000	419000	400000	420000	0	414000
Ending Stocks	103000	87000	102000	91000	0	88000
TOTAL DISTRIBUTION	499000	507000	503000	512000	0	503000

## Japanese Cod/Pollock Roe PS&amp;D Table

FISHERY PS&D DATA BASE: Fish Roes Historical Series							
Commodity: Cod/Pollock Roes (1,000 Metric Tons)							
	1999	2000	2001	2002			
		OLD	NEW	OLD	NEW	OLD	NEW
Beginning Stocks	15	13	13	10	13	12	12
Total Production	13	12	10	12	9	0	11
Intra EC Imports	NA	NA	NA	NA	NA	NA	NA
Other Imports	54	47	42	52	48	0	48
TOTAL Imports	54	47	42	52	48	0	48
TOTAL SUPPLY	82	72	65	74	70	12	71
Intra EC Exports	NA	NA	NA	NA	NA	NA	NA
Other Exports	0	0	0	0	0	0	0
TOTAL Exports	0	0	0	0	0	0	0
Dom. Consumption	69	62	52	66	58	0	60
Other Use/Loss	0	0	0	0	0	0	0
TOTAL Utilization	69	62	52	66	58	0	60

---

Ending Stock	13	10	13	8	12	0	11
TOTAL DISTRIBUTION	82	72	65	74	70	0	71

Note: Original PS&D Lotus File (As no equivalent PS&D File Created in Gain)